ORGANIZING YOUR SCHOLARLY RESEARCH WORKFLOW WITH

zotero

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Today’s Workshop Assumes…

- You are an **administrator** on your computer and have the privileges to install software
- You know how to **install** a program on your computer
- You are running **Office 2013 or later**
- You are able to use **Firefox** or **Chrome** as web browsers (**Safari** okay, but not ideal)
A Very Brief History of Zotero

“The name ‘Zotero’ [Zoh-tare-roh] is loosely derived from an Albanian verb zotëroj meaning ‘to master’” (“Zotero”).

Zotero for research is like iTunes for music

iTunes allows you to collect, store and organise songs into playlists (e.g. genre, artist)

Zotero allows you to collect, store, and organise citations for your research (e.g. course, assignment)
Citation versus Style

• **Citation** = A source in the world

• **Style** = The representation of that source
We’re going to be going step-by-step to install zotero, and a browser connector

PLEASE LET US KNOW IF YOU RUN INTO ANY DIFFICULTIES BEFORE WE MOVE TO NEXT STEP

(p.s. you will most likely run into difficulties because computers are temperamental!)
Let’s begin! Go to zotero.org
Using Zotero with Firefox? We’ve made some important changes to the way Zotero works.

Core software

Zotero 5.0 for Windows
Your personal research assistant

Download

Other platforms
macOS · Linux 32-bit · Linux 64-bit

Looking for Zotero 4.0?

Browser button

Zotero Connector
Save to Zotero from your browser

Install Firefox Connector

Zotero Connectors automatically sense content as you browse the web and allow you to save it to Zotero with a single click.

Zotero Connectors for other browsers

The downloads page
Follow the installation instructions in your browser. Example: Firefox will ask your permission before installing software on your computer. Allow the install
YOU JUST INSTALLED ZOTERO & THE BROWSER CONNECTOR!!!
Let’s add our first citation using our browser connector!

Let’s go to library.uvic.ca and search for an interesting article.

What topic should we choose?

Let’s find a source as a PDF
Once you click this icon, you should have your first citation in your library.
You’ve just made an automatic bibliography
Let’s install the plugin for MSWord
Zotero tab in MS Word
You’ve successfully inserted a reference into your paper!
Zotero standalone versus zotero.org
Think about privacy
THANK YOU!

If you have any questions, please email us at:

jmussell@uvic.ca | kmatthew@uvic.ca

If you have suggestions for future workshops, please email:

libraryworkshops@uvic.ca

(and come visit us in the Library!)
Extra material
You should now have an item in your personal library

Zotero’s main window
The “citation” is the top-level item

Under the citation you may find the files associated with that citation.
Collection (folder) pane
Tags are displayed at the bottom
Main citation window
Inspector pane
Inspector navigation tabs for Notes, Tags, and Related
Other useful buttons: note, the buttons relate to the pane beneath them
Understanding Settings
Preferences

User Interface
- Layout: Standard or Stacked
- Font size: Small, Medium, Large, or X-Large
- Note font size: 12
- Changes take effect after restart

Miscellaneous
- Automatically check for updated translators and styles
- Update now
- Report broken site translators
- Automatically take snapshots when creating items from web pages
- Automatically attach associated PDFs and other files when saving items
- Automatically tag items with keywords and subject headings
- Automatically remove items in the trash deleted more than 30 days ago

Groups
- When copying items between libraries, include:
  - child notes
  - child snapshots and imported files
  - child links
  - tags

Data Syncing
- Username: jmhuculak
- Password: [masked]
- Create Account
- Lost Password?
- About Syncing
- Set Up Syncing
Preferences: Export

Quick Copy

Quick Copy allows you to quickly export items in a given format. You can copy selected items to the clipboard by pressing Cmd+Shift+C or drag items directly into a text box in another program.

For citation styles, you can copy citations or footnotes by pressing Cmd+Shift+A or holding down Shift before dragging items.

Default Format:
- Chicago Manual of Style 16th edition (note)

Language: English (US)  Copy as HTML

Site-Specific Settings:

<table>
<thead>
<tr>
<th>Domain/Path</th>
<th>Format</th>
<th>Language</th>
<th>HTML</th>
</tr>
</thead>
</table>

Edit

Disable Quick Copy when dragging more than 50 items

Character Encoding

Import Character Encoding: (auto detect)
Preferences: Cite & Advanced

Word Processors

Save Location
Change the Type of Source
Now let’s add a Citation & PDF by Hand

- Go to Summon at library.uvic.ca
- Search for an article with a PDF and download file to your computer
- “Add citation” in the main window
- Attach PDF (next slide)
How to Attach a File: Right click on CITATION
Install Word Plugin: Cite > Word Processors
Install Word Plugin
Install Word Plugin and Restart Word & Zotero
“Library Infrastructure and the Dissemination of Social Scholarship: The Grant’s Menu”

This lightning talk reports on the new grants menu developed at the University of Victoria Libraries that was created in order to provide service to underrepresented faculty who work in areas underserved by the traditional scholarly communication cycle. In “Digital Theoria, Poiesis, and Praxis: Activating Humanities Research and Communication through Open Social Scholarship Platform Design” Saklofske et al. argue that “[d]eveloping flexible digital environments to establish open social scholarship as the default mode of critical inquiry and reporting is essential to the digital transformation of scholarly communication” (Saklofske and Group 1). Developing environments that allow scholars to share scholarship in turn creates the conditions for the “critical mass of thought” that reinforces and encourages the long-term viability of open scholarship (Arbuckle et al. 5). The university library has a central role to play in encouraging such developments since many practices and tools in Digital Scholarship are becoming more “complex” and require the building of communities “across disciplines” (Dowson 2). However, not all faculty, particularly in the Humanities, have had the same level of technical and infrastructural support needed to build resources in open social scholarship.

Vinopal and McCormick have written extensively on the issues faculty face in building long-term, scalable resources for scholarship (27). A major barrier to the development of such resources is the grant writing process. Many digital projects “depend on external funding to support their work, which means that they must constantly pursue grants and that changes in funding priorities affect their research focuses” (Lewis et al. 89). These grants are important so that faculty can direct the development of their own digital resources for open scholarship rather than relying on ready-made platforms that are not suited for open work. The University of Victoria Libraries is in a unique position to help members of the research community build flexible environments needed for open social scholarship. The Library has recently completed a “Grant Writing for Digital Scholarship” series and is working on expanding this initiative to include webinars and other resources that can help faculty with the challenges of planning and implementing open Scholarship.
Zotero in Word: A New Tab

“Library Infrastructure and the Dissemination of Social Sc
Dr. Moo is famous for the statement, “To err is human, to forgive is bovine”
Now add a Bibliography/Work(s) Cited to your paper!

- Go to end of your written work
- INSERT page break
- Type “Works Cited”
- Click “Add/edit bibliography”
To update or change your citations & bibliography, use the “edit” button.
Zotero.org: Working in Groups Online